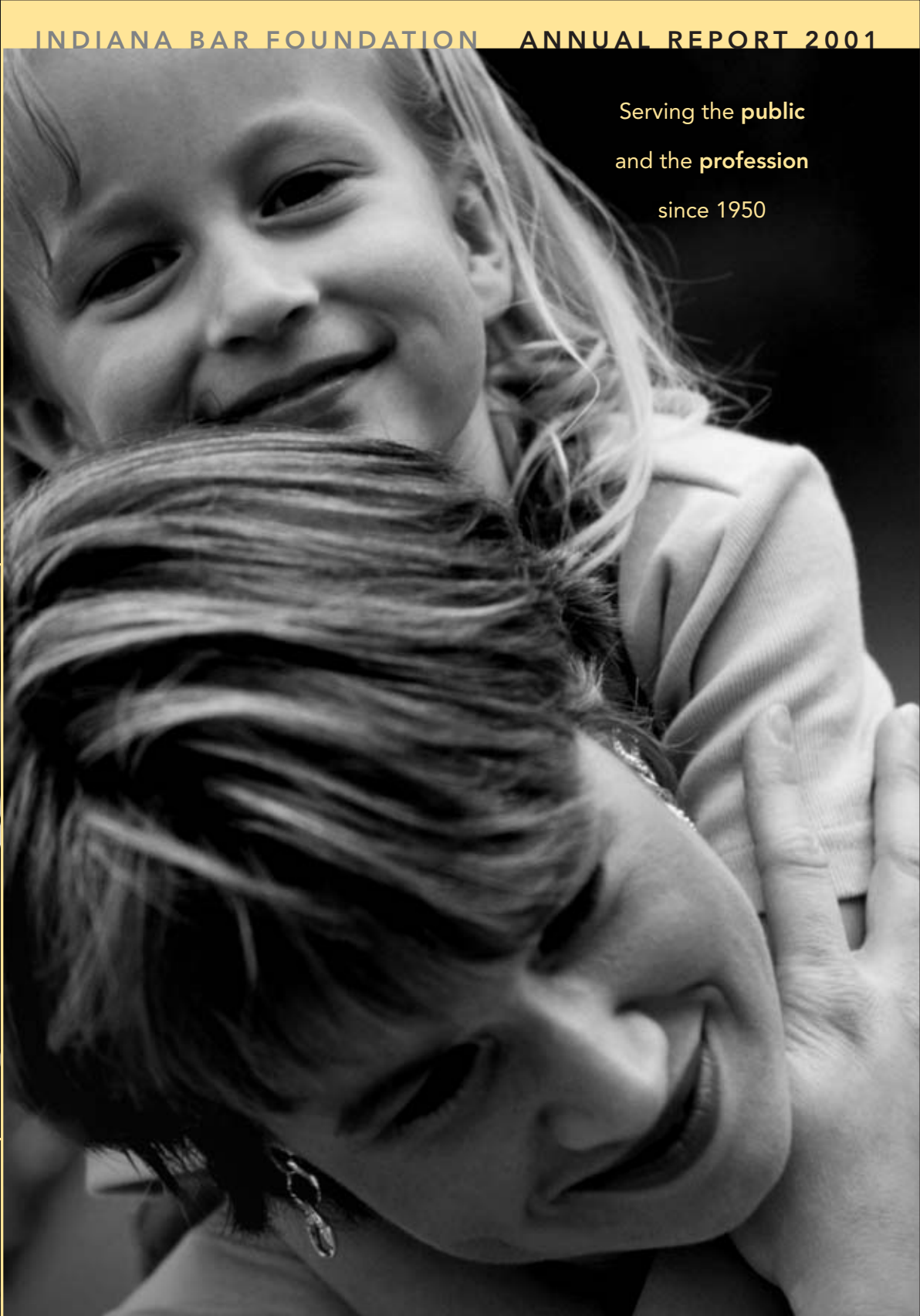


Serving the **public**
and the **profession**
since 1950



FOUNDING PURPOSES

Advancing the
administration of
justice

Promoting the
public's
understanding of
the law and the
legal system

Promoting a more
effective delivery
of legal services to
the public at large

Supporting the
introduction of the
law school
graduate to the
practice of law

Encouraging the
continuing legal
education of the
practicing lawyer

Enhancing the
legal profession's
performance of
its ethical
responsibilities

Awarding and
supporting
scholarships for
the study of law

THE POWER OF PLANNING

A SHORT HISTORY The representations of the three Indiana legal organizations have been characterized as:

Indiana State Bar Association—**the legal body**,
Indiana Continuing Legal Education Forum — **the legal mind**,
Indiana Bar Foundation—**the legal soul**.

Over six years ago, there was little opportunity for our legal soul to grow. The Indiana Bar Foundation had no staff and was not structured as a fundraising group. It was about then that long range strategic planning began. Based on that planning, the Foundation during the presidency of Clyde Compton pursued the establishment of the IOLTA program, which was accomplished during the presidency of Debbie Farmer. This provided the Indiana Bar Foundation with two full time staff members who administered the IOLTA program as well as the needs of the Foundation.

At the same time, the Indiana Bar Foundation underwent a complete restructuring changing the selection and number of directors, the slogan, and the committee organization and producing a video. Also restructured were the various giving programs such as dues check off, Fellows, and solicitation. This planning has been a long process, aided by the volunteer hours of many lawyers throughout the State of Indiana.

We are now realizing the benefits from planning or **The Power of Planning**.

BETTER FUNDING OF GOOD WORKS Last year, at the inaugural Foundation Day, over 65 new Fellows (the largest new Fellows class since the beginning) joined other Fellows by pledging annual contributions. This year, we hope to inaugurate the first class of Fellows under the new fundraising guidelines. The dues check off continues to provide increased revenues. The Interest on Lawyers' Trust Accounts (IOLTA) increased substantially until it was almost one million dollars a year before interest rates began to fall. The Foundation's share of the IOLTA money is dedicated to law-related education and scholarships.

MORE GOOD WORKS Planning and fundraising leads to more good works. This year, the law-related education programs received over \$40,000, an increase of almost \$12,000 in support. In addition, scholarships increased \$4,000 to a total of \$20,000 per year for the four law schools.

Most importantly, after a two year suspension of grants, the Indiana Bar Foundation provided over \$129,000 for grants, the largest amount ever granted in one year. The Bar Foundation is also proud of the Pro Bono Commission grants from the IOLTA program, which were over \$300,000 this year to various legal organizations providing legal services to the poor. ►



A MESSAGE FROM THE PRESIDENT

Jeffrey B. Kolb

Vincennes

President

Indiana Bar

Foundation

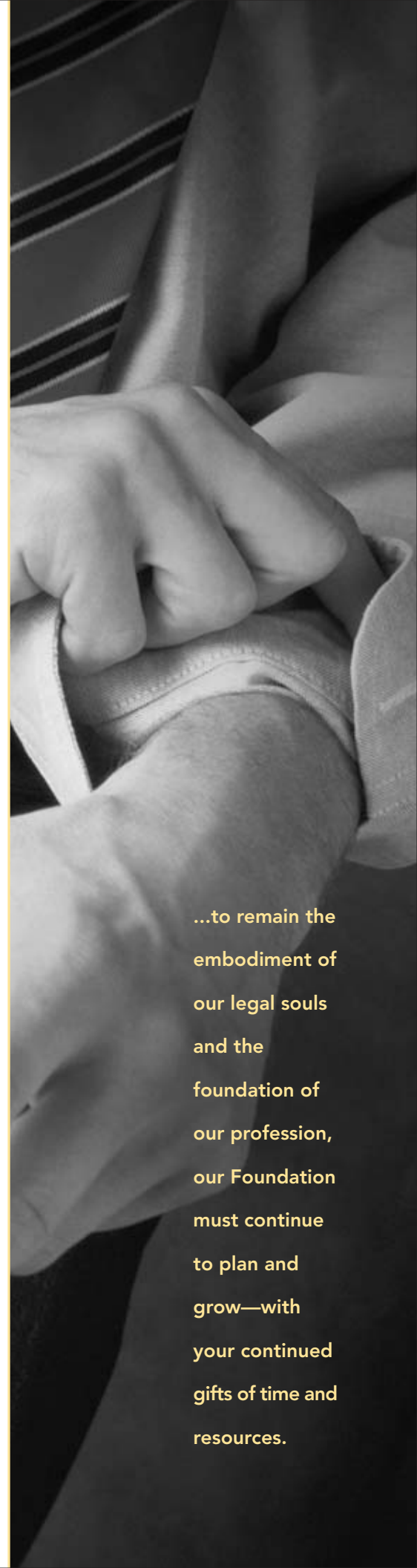
FOUNDATION DAY Join us for the second annual Foundation Day on April 13, 2002 at the new Indiana University School of Law in Indianapolis. The annual meeting will be at 10:00 a.m. where Marsha Volk will take over as Foundation president. At 1:00 p.m. there is a Fellows Institute, a low cost continuing legal education program for Fellows giving valuable estate planning advice and three hours of credit, including ethics. Finally, the Fellows Banquet tops the day with a reception beginning at 6:00 p.m. followed by a dinner.

A BRIGHT FUTURE The planning continues. Recently, Rachael McGeever resigned as executive director of the Foundation. After a substantial search process, the Indiana Bar Foundation hired Charles R. Dunlap to be the new executive director. Chuck is a lawyer trained in fund raising with substantial experience with the Indiana University Foundation. This rare combination of lawyer-fundraiser is a perfect fit for the Foundation. Under Chuck's leadership, the Foundation will grow. As I write this report, marketing and fundraising plans are being made for future growth.

A FINAL WORD It has been a wonderful two years as president. Our Foundation is in excellent shape. However to remain the embodiment of our legal souls and the foundation of our profession, our Foundation must continue to plan and grow. It can only do that with your continued gifts of time and resources. My heartfelt thank you is now given to all who have made those gifts both now and in the future.

Jeffrey B. Kow

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embodiment of
our legal souls
and the
foundation of
our profession,
our Foundation
must continue
to plan and
grow—with
your continued
gifts of time and
resources.



PARTICIPATION IN OUR FOUNDATION

As we begin the journey to the Indiana Bar Foundation's (IBF) next 50 years, there are many new and exciting initiatives also beginning. As the new Executive Director of the organization, I am enthusiastic about the great potential that exists for the IBF to make a significant and positive impact on the lives of the citizens of Indiana.

As attorneys, we have a unique level of responsibility not only to our clients, but to the community as a whole. One way to fulfill our professional responsibilities to the community is through support of the Indiana Bar Foundation. As the only statewide charitable foundation dedicated to promoting an understanding of, a respect for, and access to our system of justice, the Indiana Bar Foundation's mission is fundamental to ensuring the continued success of our third branch of state government.

It is through the dedication and commitment to our profession that the members of the Indiana legal community have enabled the Indiana Bar Foundation to have made the difference it has over the last 50 years. Many challenges will continue to face our profession in the future and in order to have an even greater positive impact in our communities, we will all need to renew our dedication and commitment to **The Foundation of Our Profession**.

There are many ways that every member of the Indiana legal community can help support the IBF. One of the most direct and easy, but yet most powerful ways to help make a positive impact is to contribute money to the Indiana Bar Foundation. In fact, by using the envelope enclosed in this annual report, your contribution can begin immediately. From the \$25 dues check-off on your State Bar Association dues, to joining the Fellows of the Indiana Bar Foundation, your tax-deductible donations provide the funding that enables the many wonderful statewide programs that the Foundation supports to continue. It is through these programs that we as members of the legal community can make a difference in the lives of our fellow Hoosiers.

Of course, in addition to financial donations, there are many other ways to participate and support the mission of the IBF. Participation can be in the form of a nomination of a fellow member of the profession for one of the many awards that the Indiana Bar Foundation presents to recognize outstanding professional achievement. Participation can also be shown through enrolling in the Interest On Lawyers' Trust Accounts ("IOLTA") program administered by the IBF which awards grants to support Pro Bono projects throughout the state.

However you decide to participate, the most important decision is that you do. I look forward to working with the many dedicated, conscientious, and hard working members of the Indiana legal community who continue to make the Indiana Bar Foundation, **The Foundation of Our Profession**.

Charles R. Dunlap



A MESSAGE FROM THE EXECUTIVE DIRECTOR

Charles R. Dunlap

Indianapolis

Executive Director
Indiana Bar
Foundation

RECOGNITION OF EXCELLENCE

PRO BONO PUBLICO AWARD WINNERS

Hon. Phillip I. Adler Vigo Superior Court #2 Terre Haute

Judge Adler has been instrumental in promoting pro bono programs in his home district (Vigo and surrounding counties in Western Indiana). Each of the two dinners that he has organized has been attended by nearly 100 area attorneys, each of whom has learned of his committee's pro bono mission. Since March, Judge Adler has successfully recruited more than 65 attorneys to handle over 55 pro bono cases in Western Indiana. Under his leadership, the District 7 Pro Bono plan has become a model for other Districts in Indiana to follow.



Deborah K. Hepler Locke Reynolds Indianapolis

Ms. Hepler was largely responsible for the formation of the Protective Order Pro Bono Project of Greater Indianapolis (POBPB). This program is designed to help victims of domestic violence seeking protective orders that do not involve dissolution. In court, these victims often do not have legal counsel, as pro bono service providers generally do not refer these individuals to pro bono attorneys. Ms. Hepler sought to change this lack of attorney representation by enlisting the help of attorneys and law school students for cases of this type. Her efforts have enabled POPBP to develop and firmly establish itself, and the hiring of the first full-time director of POPBP is imminent.



Kay L. Pechin Volunteer Lawyer Program of Southwestern Indiana Evansville

From June, 2000 through July, 2001, Ms. Pechin devoted several hundred hours of her time to the establishment and development of the pro bono program in District 13, which includes eleven counties in southwestern Indiana. She sought to determine the needs of the indigent in District 13, both through historical research and by contacting local bar associations and agencies. Ms. Pechin coordinated the efforts of VLP with those of other programs in southwestern Indiana in order to serve the indigent in that region more efficiently. In fact, VLP is currently promoting its services through a mass publicity campaign.



50-YEAR AWARD WINNER

Rabb Emison, a graduate of the School of Law at IU-Bloomington in 1950, began the practice of law with his father in Vincennes. The firm is considered the oldest continuous law firm in Indiana beginning in 1819 upon the arrival of New Jersey lawyer Samuel Judah. Emison graduated from DePauw University in 1947 after his undergraduate studies were interrupted with a 3-year tour of duty with the U.S. Navy. A year after his practice began, Emison was recalled to duty to serve for nearly two years in Brooklyn during which his duties were divided between legal work and time spent upon New York harbor.



Emison's practice has consisted mostly of litigation concentrated in insurance defense. Other duties were in real estate, flood control and government. He is the author of several legislative measures. His grandfather, James Wade Emison, wrote the first levee law in Indiana adopted in 1907. His father, Ewing Emison, wrote amendments to that law, the most prominent being the amendment which utilized

Federal Aid, adopted in 1947. Rabb Emison wrote an amendment adopted in 1967. It replaced the 1907 Acts by absorbing those measures into the Conservancy Act. Rabb Emison prepared legislation which authorized a city in Indiana to enter into a compact with a city in an adjoining state to operate an airport.

Emison has served as a Trustee at Vincennes University, on the Alumni Board at DePauw and on the Board of Visitors of the School of Law at IU-Bloomington. He has taught at the paralegal school at Vincennes University. He has received a distinguished alumnus award from each of the schools from which he has graduated—Vincennes High School, DePauw and the IU-Bloomington School of Law.

Emison has served in various offices in the Indiana Bar Association. He has served on the Board of Managers, chaired the House of Delegates, served on the Board of ICLEF and was President of the Association. During his term as President, he instituted the Commission on Minorities in the profession. That group created the Rabb Emison Award and gave him the first one. He presently serves on the CLEO committee instituted by Chief Justice Shepard.

Emison and his wife Kathleen have two daughters, Susan Emison of Dunn Loring, Virginia and Anne Wishard of Indianapolis, Indiana.



C L A S S O F 2 0 0 1

FELLOWS

New Master Fellows

Robert B. Clemens
James E. Sullivan

Upgrades to Master Fellows

Corinne R. Finnerty
Thomas A. Pyrz
Honorable Margret G. Robb

Fellows

Judith A. Levy Adler	Honorable James S. Kirsch
Honorable David A. Ault	Honorable James D. Kleopfer, Jr.
Eric K. Ayer	Honorable Michael J. Kramer
James E. Ayers	Honorable Diana J. LaViolette
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Kathryn J. Cook	Julie A. Newhouse
D. Scott Craig	Mark A. Palmer
Martha J. Crossen	J. Mark Robinson
Honorable W. Timothy Crowley	Peter J. Sacopulos
Honorable Daniel F. Donahue	Magistrate Kris M. Costa Sakelaris
Honorable David J. Dreyer	Michelle A. Simmons-Brown
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Robert L. Houston, III	Honorable Ernest E. Yelton
James W. Kaminski	

In October 1979, the Fellows of the Indiana Bar Foundation was established as an entity within the Foundation responding to the need to revitalize and redirect efforts of the Foundation toward increased support of programs which promise broad public impact and benefit and offer added professional honor and evidence of professional distinction.



GRANTS INDIANA BAR FOUNDATION—AWARDED 2001

Since 1950, the Indiana Bar Foundation has supported programs that ensure the future of the justice system. By promoting law-related education and enhanced community access to—and understanding of—the legal system, members of the bench and bar have become important benefactors to their communities.

**Total Approved
Grants and
Distributions
\$429,513.00**

Bartholomew Area Legal Aid \$5,000.00

Making pro bono work—Assisting District 11 Pro Bono Council to hire additional staff and create pamphlets for pro bono lawyers. Bartholomew County.

IARCCA—Institute for Excellence \$7,500.00

Publish the Spanish edition of the manual assisting in implementation of the Adoption and Safe Families Act (ASFA) for Latino families. Marion County & Statewide.

Indiana High School Mock Trial \$5,000.00

Create and distribute a video of the Mock Trial program to high schools throughout the state. Create a deeper appreciation of the legal system for high school students. Tippecanoe County & Statewide.

Indiana Justice Center \$6,000.00

Access to Justice Conference—third annual forum for judiciary, private bar, legal services providers, and law schools. Marion County & Statewide.

Indiana Legal Services \$15,000.00

Community Legal Education Pamphlets Project—Enables LSO to print 10,000 copies of 36 different pamphlets for distribution around the state. Marion County & Statewide.

Indiana Pro Bono Commission \$3,000.00

Producing an Indiana lawyer insert that describes the goals and work of the Pro Bono Commission. Marion County & Statewide.

Indiana Pro Bono Districts \$300,000.00

IOLTA funds distributed to support pro bono projects. Statewide.

Indiana Program for Law-Related Education \$2,775.00

Indiana Program for Law-Related Education Website expansion to include attorney and teacher resources. Monroe County & Statewide.

Indiana Program for Law-Related Education \$8,456.00

Creates correlation between state social studies standards and We the People. Monroe County & Statewide.

Law Student Scholarships \$20,000.00

Scholarships for students at each of Indiana's four law schools. Statewide.

Legal Aid Society of Evansville, Inc. \$3,000.00

Tenant legal rights video—produced to present, in layman's terms, a tenant's legal rights and responsibilities. Vanderburgh County.

Legal Services of Maumee Valley, Inc. \$7,332.00

Domestic violence civil justice alliance pro se clinics—hiring a lawyer/paralegal to assist in clinic for domestic violence victims. Allen County.

Midwest Center on Law and the Deaf \$3,000.00

Promoting rights and enabling access of hard-of-hearing attorneys in the Midwest—to promote access to legal assistance for the deaf and hard of hearing community in Indiana via promotional materials in the deaf and legal communities. Statewide.

Nancy Goodman Trust \$500.00

Indiana Bar Foundation Scholarships for law students. (Rotating) Statewide.

Reach for Youth, Inc. \$1,950.00

Teen court courtroom—for moving expenses for the moot court room that has been donated by the I.U.—Indianapolis Law School. Marion and Johnson Counties.

Res Gestae \$7,500.00

Financial support for the Indiana State Bar Association's Journal. Statewide.

Volunteer Lawyer Program of Southwestern Indiana, Inc. \$4,000.00

Promotional materials for Pro Bono District 13 that includes brochures, posters, plaques. Southwestern Indiana counties.

We the People \$29,500.00

Teacher education program for the annual summer training program at Indiana University and support for annual statewide school competition. Monroe County & Statewide.

LAW STUDENT SCHOLARSHIP RECIPIENTS 2001

Indiana University School of Law—Indianapolis

Ms. Chasity Thompson
Indianapolis \$1,000.00

Mr. J. Kirk Le Blanc
Indianapolis \$1,500.00

Ms. Jill Baniewicz
Indianapolis \$1,500.00

Indiana University School of Law—Bloomington

Mr. John W. Madison
Bloomington \$1,000.00

Mr. Daniel J. Moore
Bloomington \$1,000.00

Ms. April J. Risk
Bloomington \$1,000.00

Ms. Lora M. Whitticker
Bloomington \$1,000.00

Valparaiso University

Ms. Melissa Garland
Valparaiso \$1,500.00

Ms. Melinda Bentley
Valparaiso \$1,500.00

Ms. Christina Gindratt
Valparaiso \$1,000.00

University of Notre Dame

Mr. Marcus Ellison
Granger \$1,000.00

Ms. Nicole Barnard
Notre Dame \$750.00

Ms. Kristina Hiebert
Elkhart \$750.00

Mr. Ryan Redmon
Notre Dame \$750.00

Ms. Leslie Saunders
Notre Dame \$750.00



IOLTA UPDATE

by Michael A. Tranovich

IOLTA Project Manager

Calendar Year 2001 was another successful year for the Indiana Interest on Lawyers' Trust Accounts (IOLTA) program. Despite the down economy, over \$800,000 in IOLTA revenue was collected by the Indiana Bar Foundation, more than doubling projections. Distribution of \$600,000 of this IOLTA interest to the Pro Bono Districts throughout Indiana was suggested during a Pro Bono Commission meeting in September and approved at the Indiana Bar Foundation Board of Directors meeting in October. The Foundation is pleased to be the administrators of Indiana's IOLTA program on behalf of the Supreme Court.

Cooperation by the participating banks has been superb. The vast majority of the banks remit within a few days of the cycle dates of their IOLTA accounts. The advent of electronic remittance has enabled nearly two-thirds of all IOLTA account information to be processed in a markedly more efficient manner than manual entry. Faster processing leads to more money available for distribution.

Special recognition and thanks go out to the following ten banks with the highest IOLTA account yields, based on November, 2001 remittances, as reported to the Indiana Bar Foundation:

Ranking	Bank Name	Cumulative Percent Yield
1	Peoples Trust and Savings Bank (Boonville)	5.000
2	First State Bank (Bourbon)	2.000
	United Commerce Bank (Bloomington)	2.000
4	Salin Bank & Trust	1.960
5	First Federal Savings Bank (Huntington)	1.938
6	Farmers State Bank (Brookston)	1.750
	Friendship State Bank	1.750
	West End Savings Bank (Richmond)	1.750
9	Grabill Bank	1.663
10	Citizens State Bank (New Castle)	1.650

The outlook for the future is optimistic. The Pro Bono Councils in each District continue to develop programs to bridge the gap between service providers and the less fortunate Indiana citizens who desperately need these services. The Foundation will continue to work hand in hand with participating banks, the Pro Bono Commission, and the Indiana Supreme Court to streamline the IOLTA program and maximize IOLTA revenue. Non-participating lawyers and law firms will be encouraged to participate and assured that the enrollment process is extremely simple and takes only a few minutes.

The Foundation is always willing to answer questions on IOLTA and assist in IOLTA related matters. We may be reached at (317) 269-2415 or (800) 279-8772.

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 Hon. Diane K. Schneider

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REVENUE	Unrestricted	Restricted	Total
Contributions:			
Fellows.....	\$ 60,350	\$ 0	\$ 60,350
Checkoff	49,640	0	49,640
Other	7,882	0	7,882
	<u>114,927</u>	<u>0</u>	<u>114,927</u>
Fellows dinner/reception	14,269	0	14,269
50th dinner Reception.....	23,220	0	23,220
Kids' Election Project	0	0	0
Older Adults.....	0	1,435	1,435
Nancy Goodman.....	0	4,175	4,175
Indiana Bar Center income	348,699	0	348,699
Investment income	16,114	19,996	36,110
IOLTA revenue.....	0	791,456	791,456
Pro Bono Commission	0	11,015	11,015
	<u>520,174</u>	<u>828,077</u>	<u>1,348,251</u>
TOTAL REVENUES BEFORE RELEASE OF NET ASSETS FROM RESTRICTIONS	520,174	828,077	1,348,251
NET ASSETS RELEASED FROM RESTRICTIONS RELATING TO PROGRAM SERVICES	505,994	(505,994)	0
TOTAL REVENUES.....	1,026,168	322,083	1,348,251
PROGRAM SERVICES AND GENERAL EXPENSES			
Program services:			
Grants, allotments, and scholarships 2001	53,000	0	53,000
Grants, allotments, and scholarships 2002	129,513	0	129,513
IOLTA Pro Bono grants	300,000	0	300,000
Older Adults Project.....	0	0	0
Children's Project.....	0	0	0
CLEO.....	330	0	330
IOLTA	78,718	0	78,178
IOLTA organization costs amortization.....	0	0	0
Pro Bono Commission	43,885	0	43,885
	<u>642,850</u>	<u>0</u>	<u>642,850</u>
General expenses:			
Indiana Bar Center expenses	312,483	0	312,48
Salary	74,620	0	74,620
Professional services.....	6,316	0	6,316
Marketing	9,416	0	9,416
Fellows dinner/reception	37,251	0	37,251
Office expense	17,250	0	17,250
Annual report.....	7,247	0	7,247
Trustee fees	6,475	0	6,475
Conferences, meals, and travel	5,797	0	5,797
Miscellaneous.....	4,749	0	4,749
Losses on investments.....	9,302	0	9,302
Fundraising expenses	0	0	0
	<u>490,906</u>	<u>0</u>	<u>490,906</u>
TOTAL PROGRAM SERVICES AND GENERAL EXPENSES AND FUNDRAISING	1,133,756	0	1,133,756
CHANGE IN NET ASSETS	(107,588)	322,083	214,495
BEGINNING NET ASSETS	1,389,651	235,639	1,625,290
ENDING NET ASSETS.....	\$1,282,063	557,722	1,839,785



To the Board of Directors
Indiana Bar Foundation
Indianapolis, Indiana

We have audited the accompanying Balance Sheets of the Indiana Bar Foundation as of June 30, 2001 and 2000, and the related Statements of Activities, and Cash Flows for the years then ended. These financial statements are the responsibility of the Foundation's management. Our responsibility is to express an opinion on these financial statements based on our audits.

We conducted our audits in accordance with generally accepted auditing standards. Those standards require that we plan and perform the audits to obtain reasonable assurance about whether the financial statements are free of material misstatement. An audit includes examining, on a test basis, evidence supporting the amounts and disclosures in the financial statements. An audit also includes assessing the accounting principles used and significant estimates made by management, as well as evaluating the overall financial statement presentation. We believe that our audits provide a reasonable basis for our opinion.

In our opinion, the financial statements referred to above present fairly, in all material respects, the financial position of the Indiana Bar Foundation as of June 30, 2001 and 2000, and the results of its operations, changes in net assets, and cash flows for the years then ended in conformity with generally accepted accounting principles.

RJPile and Company, LLC

Indianapolis, Indiana
August 31, 2001



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The Foundation of Our Profession

**The Indiana Bar
Foundation maintains
an IRS classification as
a 501(c)(3) charitable
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